DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

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To: Low-Income Home Energy Program (LSP)
              Program Managers

From: Jason Wimbley, Division Chief
              Energy and Environmental Services

Subject: Energy Automation

Date: September 17, 2008

As you know, the Department of Community Services and Development (CSD) plans to retain the services of Central Coast Energy Services (CCES) to develop a software solution that would improve and offer efficiencies to LIHEAP Service Provider (LSP) data collection and reporting efforts. The new software solution, also referred to as "ServTraqLITE", is a standardized and basic software version of the "ServTraq" (full-version) software package currently utilized by many LSPs. The software design of ServTraqLITE is specifically oriented to supporting CSD energy program data collection and reporting requirements for the following direct service activities: the DOE and LIHEAP Weatherization; HEAP and Fast Track utility assistance; Wood/Propane/Oil energy assistance, Emergency Heating & Cooling services, and support the electronic file transfer of programmatic data to CSD. ServTraqLITE will not offer the customizable and the more advanced features (e.g., inventory, contact management) offered in the full software version. CSD intends to provide the ServTraqLITE software to all LSPs at no cost.

The 2006 LIHEAP Contract incorporated the "Energy Automation Set-Aside" line item, intended to provide financial support to LSPs for program automation expenses, including: computer equipment, software licensing costs, information technology consultant services, internet access, and a one-time supplement for salaries and wages for staff associated with the direct implementation of program automation. Due to delays with the original automation planning effort, the department offered the opportunity for LSPs to extend the contract term of the 2006 LIHEAP Contract through December 31, 2008, in efforts to preserve this one-time funding to cover eligible expenses under the new automation project plan. CSD encourages LSPs to immediately begin evaluating the available system options and develop plans to expend the balance of any remaining Energy Automation Set-Aside funding under the 2006 LIHEAP Contract. **Due to the expenditure life of the 2006 PY funding, CSD will not be able to honor any term extensions beyond December 31, 2008.**

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Under the new automation plan, LSPs will have the system options of ServTraqLITE, or independent agency database system (capable of supporting CSD's data collection and reporting requirements). At the moment, CCES is unable to accommodate any new requests for the full software version, due to the agency's staffing and resource commitment to the development of the ServTraqLITE application. However, CCES remains committed to supporting the existing (ServTraq) applications in use within many LSP organizations, and will enter into its own negotiations for providing ongoing support and updates/enhancements to these applications.

CCES is making significant progress on the development of the ServTraqLITE software application and we hope to begin software testing by October – November 2008. With the successful completion of the software testing, CSD anticipates the phased roll out of the software and training to occur during the months of January 2009 – March 2009. CCES has arranged for two software demonstrations intended to offer LSPs who are not current users of the full version software and opportunity to preview the ServTraqLITE software application and its various features. We strongly encourage LSPs to send Program and Information Technology staff to attend the software demonstration and to take full advantage of this opportunity to preview the software and pose questions regarding the energy automation effort. The following are the scheduled dates and locations of the software demonstrations:

Sacramento ServTraqLITE Demonstration
Monday, September 29th at the Community Resource Project, 250 Harris Avenue, Sacramento, CA 95838

Kings ServTraqLITE Demonstration
Tuesday, September 30th at the Kings Community Action Organization, 1130 N. 11th Avenue, Hanford, CA 93230

It is my hope this information proves to be useful in aiding your agencies automation planning efforts and considerations on the selection of a database system application best serving your organizations needs and preferences. To further assist this effort, attached is a document summarizing the basic software and hardware requirements necessary to support the ServTraqLITE system application. The purchase of any software and hardware to support the ServTraqLITE system are considered eligible expenditures of "Energy Automation Set-Aside" funding. Please use this information to carryout the assessment of your organizational capacity to support ServTraqLITE and fiscal planning.

Should you have any questions or require further clarification, please contact Jodi Basham at (916) 341-4270your assigned field representative.